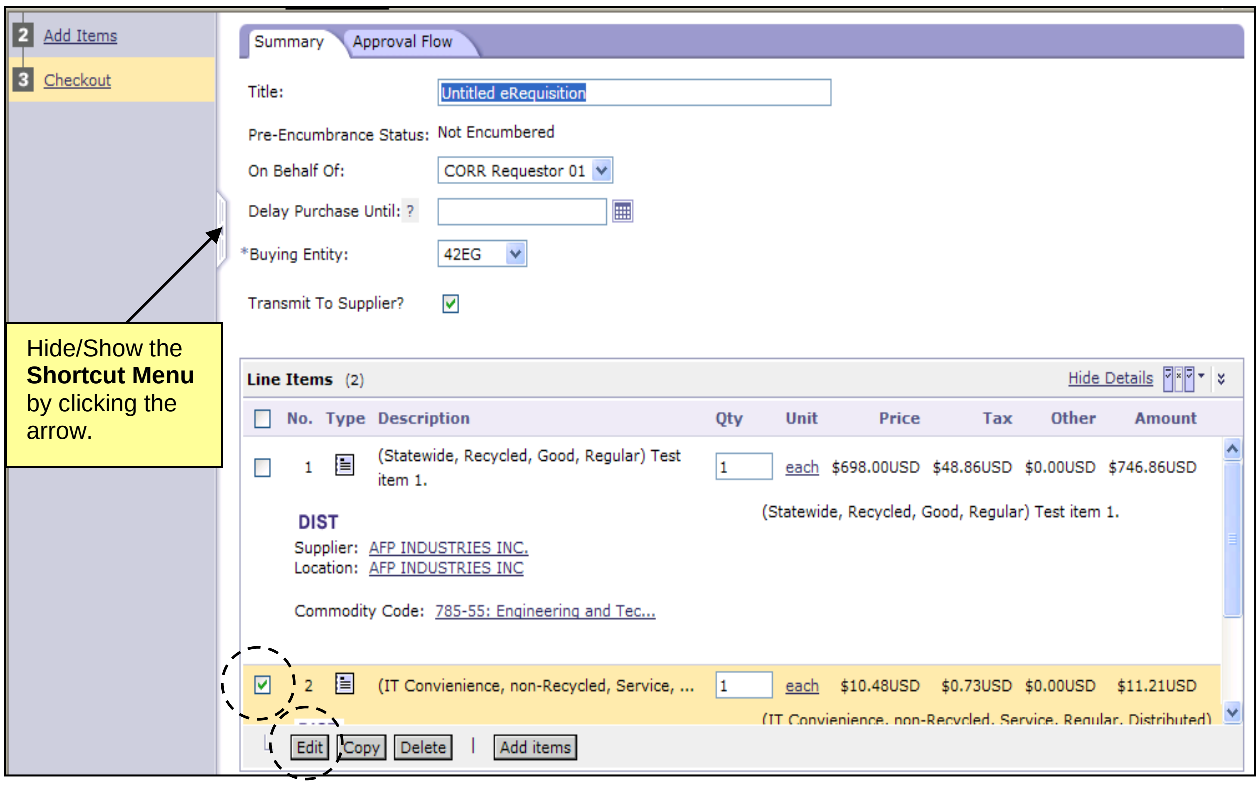
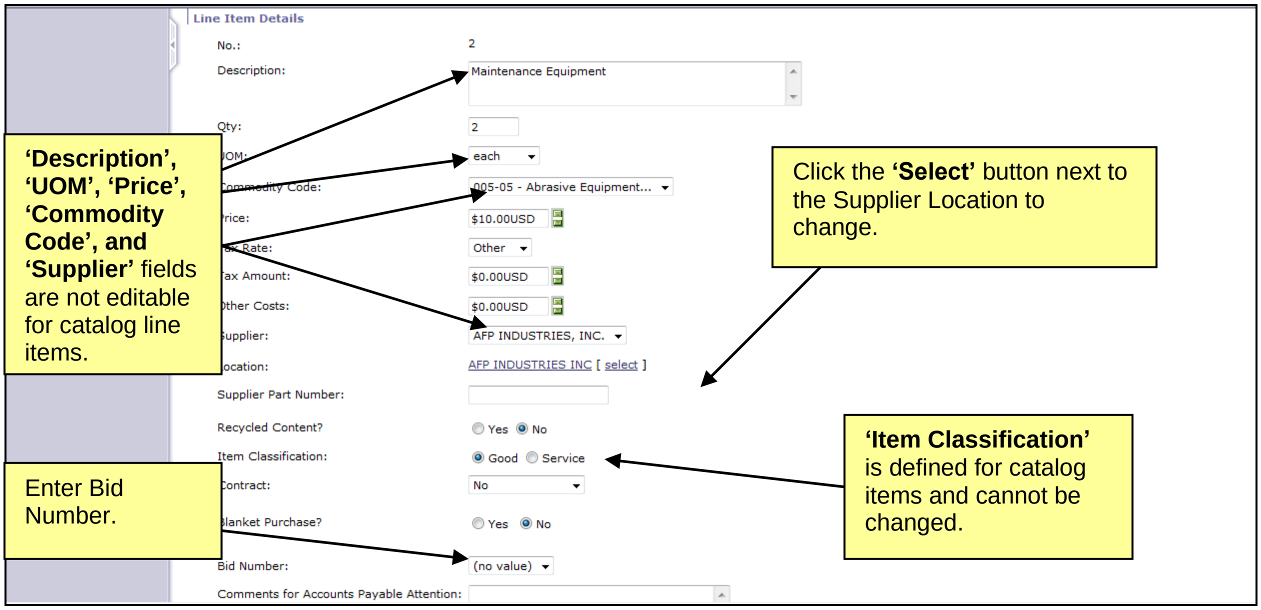
Editing Line Items

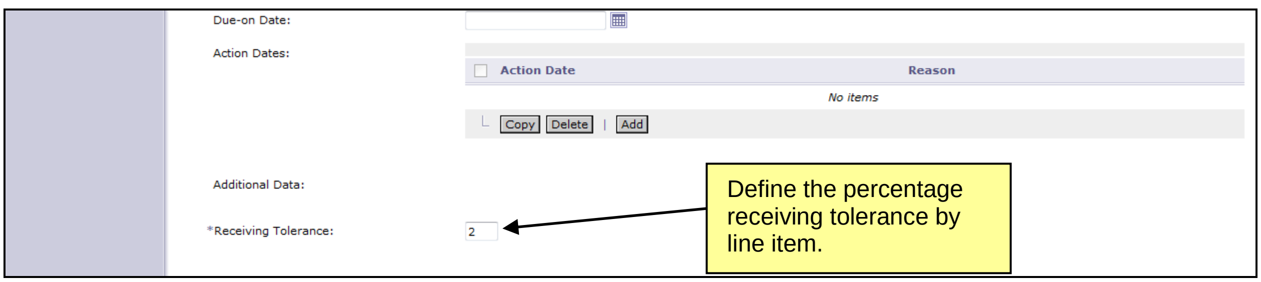
This process guide provides instruction on the functional steps to edit line items on an eRequisition. To add additional line item information, such as accounting information, users can edit the line item from the Shopping Cart or Checkout page. The same line item information is available to edit in both places. The following example utilizes the Checkout page of the eRequisition.

1.0 Editing a Single Line Item



1. Place a checkmark in the checkbox beside the line item to edit and click the **'Edit'** button. The Edit Line Item page displays. All details related to the line item are shown on the Edit Line Item page. Users may update the necessary information from this page.





Line Item Details:

2. **Item ID** – Allows user to enter the NCAS Inventory ID.

3. **Warehouse ID** – Allows user to enter the NCAS Warehouse ID.

Note: The Item ID and Warehouse ID are generated to ensure only valid combinations can be selected using the dropdown boxes. These values must be valid in the NCAS inventory module. Enter information in the order the fields are displayed: Item ID, then Warehouse ID.

4. **Stock Keeping Unit** - Allows users to enter the appropriate value in which the item is stored for inventory.

5. **Conversion Factor** - Allows users to enter a value to convert the unit of measure to the proper stock keeping unit.

6. **SKU Quantity** -- A display-only field giving the user a visual check of the quantity that will be posted to inventory in NCAS. This will help ensure that the user entered the correct value as the **'Conversion Factor'** (e.g., 12 instead of 1/12)

7. **Comments for Accounts Payable Attention –** Allows comments to be entered and passed to NCAS for Accounts Payable (AP). Only one AP Attention comment can be added per line. AP comments do not print on the purchase order.

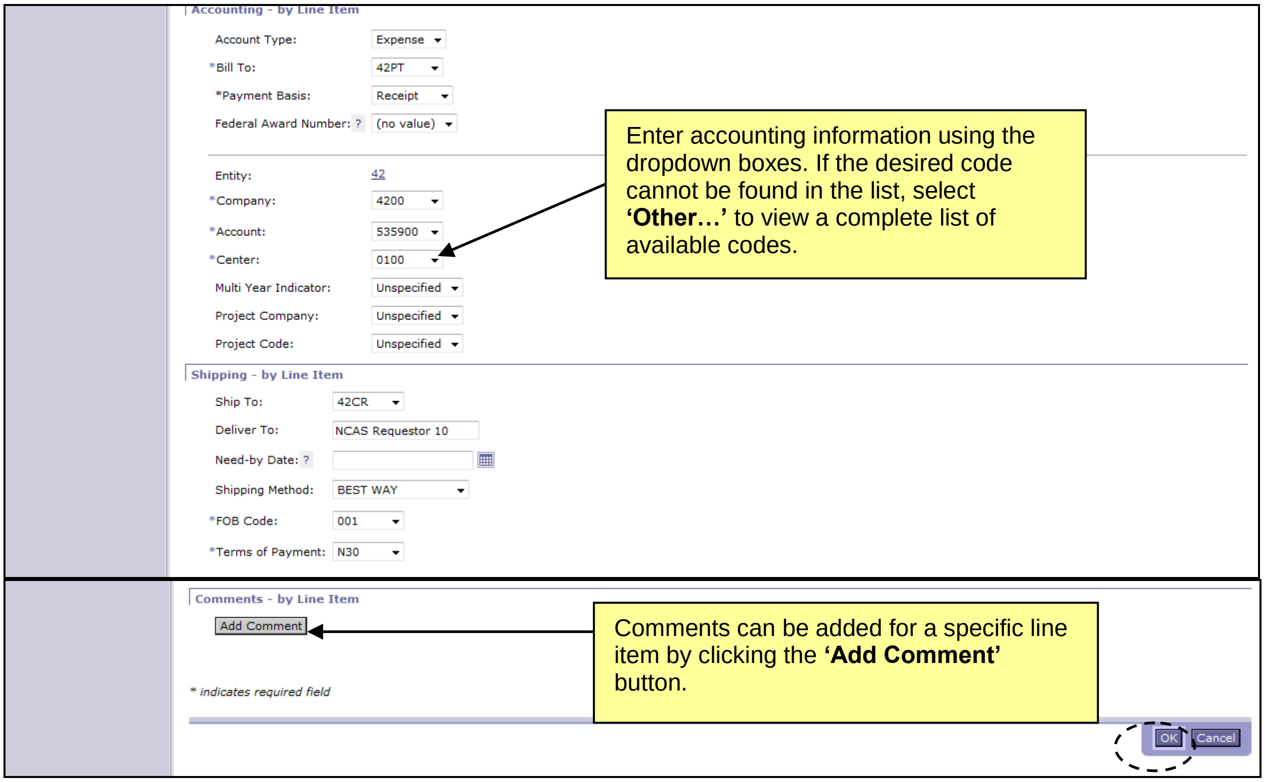
8. **Due-on Date –** Allows users to designate a due date for vendors that will print on the purchase order. Type a date in the Due-on Date field or click the calendar icon to select a date from the calendar.

Note: Users with appropriate permissions can create standard reports utilizing the Due-on Date field. The Orders Due Soon and Overdue Orders reports contain a filter for this field.

9. **Action Dates** – Allows users to create action date reminders for an eRequisition line item. To add an action date, click the **'Add'** button, located under the blue Action Date menu. Use the calendar icon to enter the appropriate date. Select an action date reason from the reason dropdown menu. Users can add up to 5 action dates per line item; however, only one of each reason can be entered. If users attempt to add two action dates with the same reason the system will display an error message requiring a change to the reason entered or deletion of the duplicate line. Users can delete action dates by checking the checkbox next to the action date and clicking the **'Delete'** button.

10. **Additional Data** – When an eRequisition line item is a bForm item the additional information for that line item (e.g., color, size) will display in the additional data field.

11. **Receiving Tolerance** – Users can receive against a line item up to the dollar amount ordered plus the designated percentage entered in the Receiving Tolerance field. The **'receiving tolerance'** field will default to 2%. User may update this amount by entering the appropriate percentage in this field (% sign is not required).



Accounting – by Line Item

12. **Account Type** – Defaults to **'Expense'** and should not be modified.

13. **Bill To** – Defaults from the user's profile but can be modified using the dropdown box. The Bill To code selected will determine the Bill To address that is printed on the purchase order. The invoice will be delivered to the specified address.

14. **Payment Basis** – Defaults to Receipt or Signature based on the unit of measure specified. This information is passed to NCAS to determine the payment basis in NCAS.

15. **Company** – Defines a unique fund type within a reporting entity.

16. **Account** – Defines the purpose of the expenditure.

17. **Center** – Defines the type of expenditures made by an individual cost center.

Note: The **'Company', 'Account',** and **'Center'** fields are generated to ensure only valid NCAS general ledger accounting combinations can be chosen using the dropdown boxes. Enter information in the order the fields are displayed: Company, Account, and then Center.

Note: If a selected accounting combination is not valid, users may have to back out all information from subsequent fields by selecting '**(no value)'** from the **'Other…'** menu. For example, to update the **'Company'** field users may have to set the **'Account'** and **'Center'** fields to **'(no value)'** first.

Shipping – by Line Item

18. **Ship To** – Use the dropdown box to choose the appropriate shipping address.

19. **Deliver To** – Enter the name and/or department in which the merchandise should be delivered.

20. **Needy-by Date: ?** – Enter the date for the items to be delivered, if necessary.

21. **Shipping Method** – Using the dropdown box, choose the appropriate shipping method.

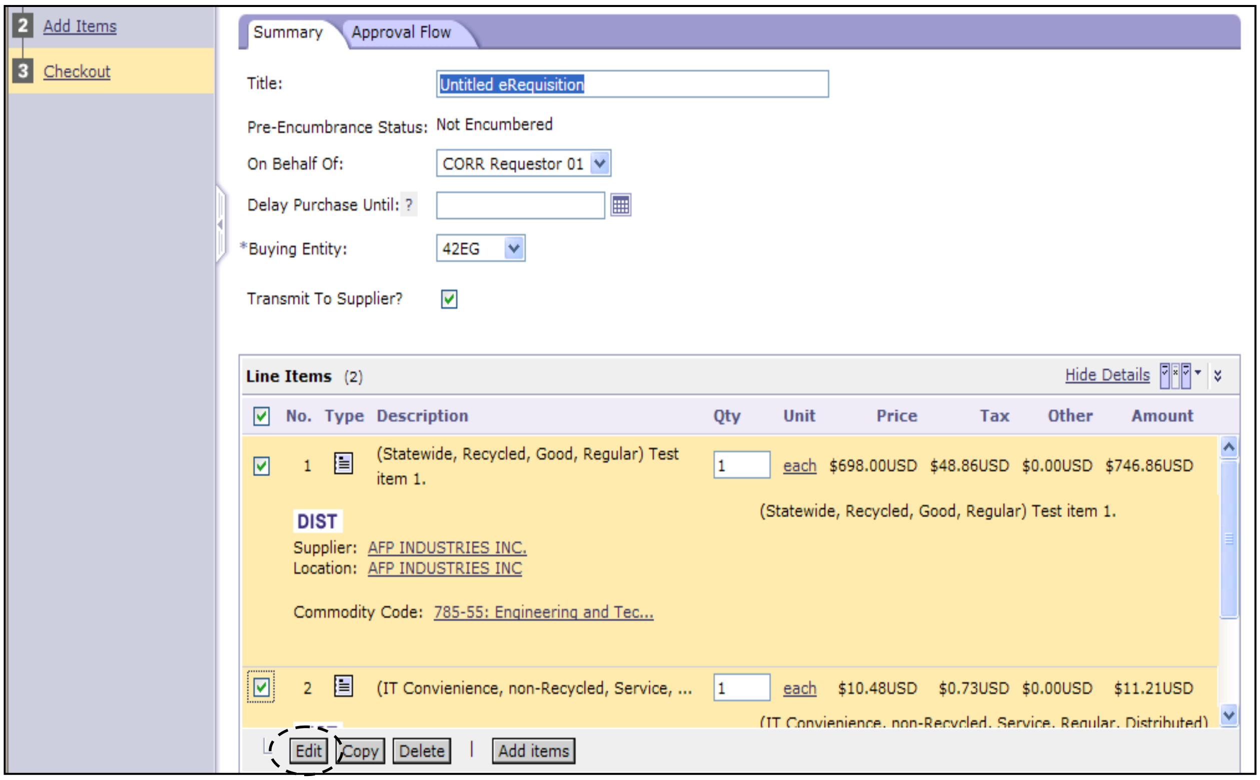
22. **FOB Code –** Select the FOB (Freight on Board) code using the dropdown box.

23. **Terms of Payment** – Enter the appropriate terms of payment for this purchase order.

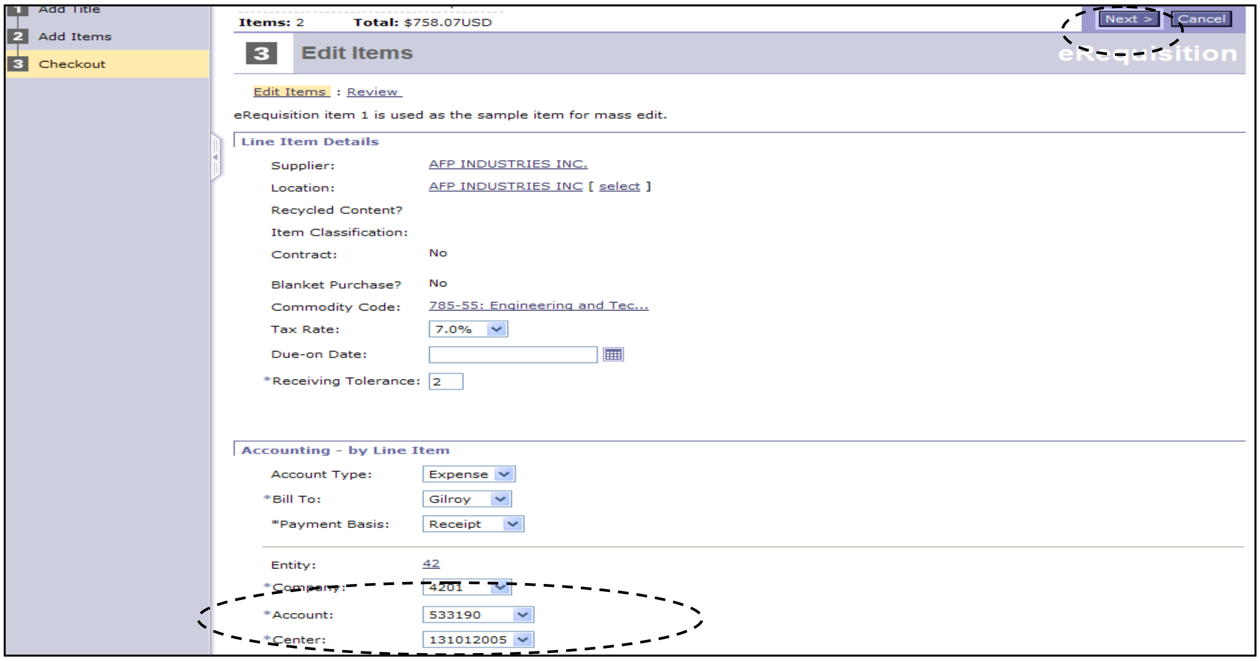
24. Click the **'OK'** button to complete all edits for this line item.

2.0 Mass Edit Function

When creating an eRequisition with multiple line items, users can mass edit eRequisition line items to set the same values for multiple lines. Not all fields are available using the mass edit function. Users may find this feature particularly helpful when setting accounting combinations. Commodity codes on non-catalog items can also be changed using the mass edit function.



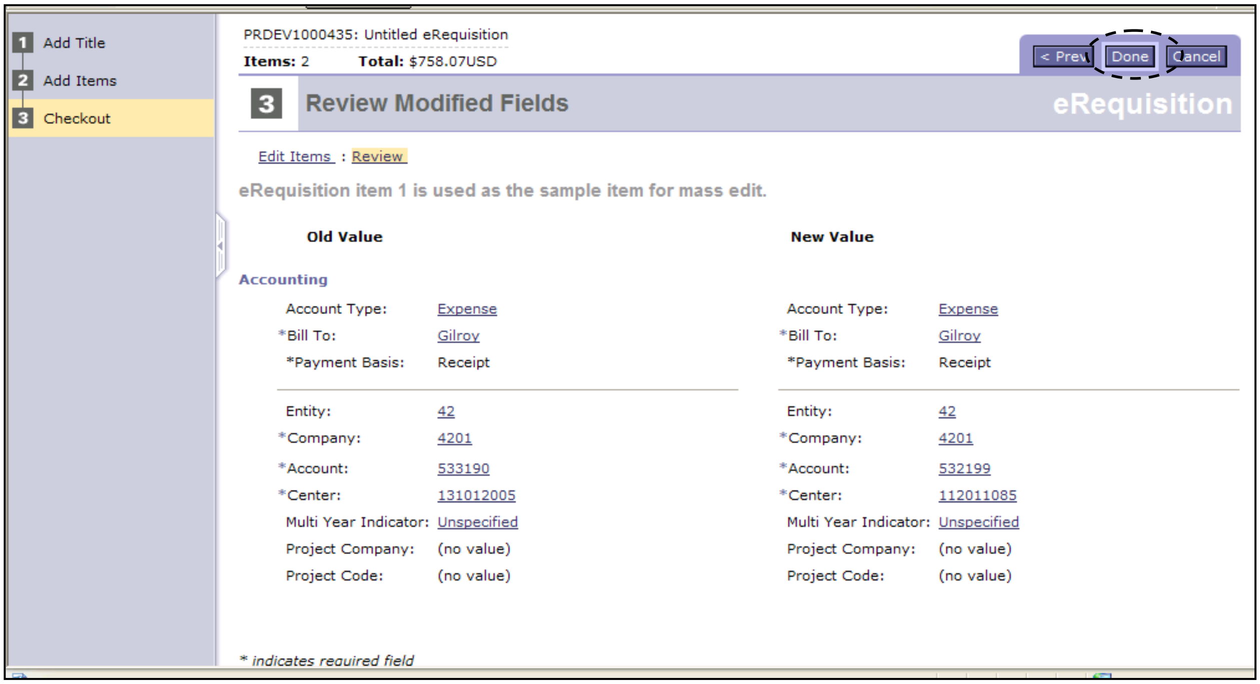
1. Place a checkmark in the checkbox beside each line item to edit and click the **'Edit'** button. This begins the mass edit function.



2. Edit the necessary fields and click the **'Next'** button to continue.

Note: The mass edit function uses line item 1 as a sample item for the mass edit. Users edit the necessary fields on the sample line item. When done editing, the changes made against this line item will be applied to all selected line items.

Note: If the mass edit function includes a combination of catalog, non-catalog, punchout, and eQuote line items, users will only be able to mass edit fields that are editable for a catalog line item.



3. Review the modified fields and click **'Done'** to complete the mass edit.